

The Invisible Buyer

Content, Trust & GTM in the Age of AI Agents

15 structural shifts reshaping B2B content, discovery, and GTM for Indian founders selling to US and EU markets.

Sources: Gartner · Forrester · 6sense · Cloudflare · YC RFS 2026 · Digiday · Ahrefs · CMI 2025

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Your buyers made their shortlist before they ever contacted you. **94% of B2B buyers already use LLMs during purchase research.** Bot traffic will exceed human traffic by 2027. The MQL (which Forrester invented) has been officially retired by Forrester. And Reddit now earns \$203M a year licensing its uniquely human content to AI companies. The content, marketing, and GTM playbooks that built Indian SaaS to \$25B are breaking apart. This report covers 15 structural shifts and what each one means for Indian B2B founders selling to US and EU markets.

94% Use LLMs to research before contacting any vendor · 6sense 2025	2027 Bot traffic exceeds human on the open internet · Cloudflare	61% Journey is invisible completes before vendor contact · 6sense	58% Zero-click searches Google queries ending with no click · Ahrefs
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Shift 01 Buyer Behavior

Agents Buy from Agents: Why Your GTM Motion Needs to Change

Something quietly crossed a threshold in 2025. A ChatGPT agent doing research on your behalf does not visit five websites the way you would. It visits five thousand. **Cloudflare CEO Matthew Prince put a number on it at SXSW 2026:** for every task a human performs with five web visits, an AI agent performs the same task with roughly 5,000 page requests. That is not a metaphor. That is measurable load, and every company serving web traffic is now dealing with it.

Gartner forecasts that by 2028, AI agents will outnumber human sellers by 10x. Forrester found that 74% of B2B organisations are already adopting AI agents in purchasing workflows. G2's survey of 1,169 enterprise decision-makers confirmed that 29% now start vendor research via LLMs more often than Google, a number that was essentially zero three years ago.

The critical shift: agents do not respond to persuasive copy. They parse structured data. An agent evaluating your product does not read your "Why Choose Us" page. It queries your OpenAPI spec, checks schema markup, counts your G2 reviews, and synthesises a recommendation from structured signals, not narrative ones.

"When you ask an agent to go plan a vacation or shop for something, it goes to 5,000 sites for a task a human would do on five. That is real traffic. That is real load."

MATTHEW PRINCE, CEO CLOUDFLARE — SXSW 2026

10x

AI agents vs sellers

Gartner prediction by 2028

18,510%

Agentic traffic surge

within hours of ChatGPT Agent launch · Forter

29%

Start with LLMs

B2B buyers researching via AI before Google · G2

For Indian B2B founders: Your GTM infrastructure needs rebuilding to be discoverable by machines. Add schema markup, publish an OpenAPI spec, implement llms.txt, and ensure your G2 presence is active. Reddit and G2 are the two sources AI tools cite most when recommending software.

Shift 02 Discovery & Attribution

70% of Your Buyer's Journey Is Invisible, and Your Analytics Are Lying to You

The 6sense 2025 Buyer Experience Report, drawn from 4,000+ respondents, found that **61% of the B2B buying journey completes before any vendor contact**, and only 3% of website visitors self-identify through form fills. The other 97% are researching, comparing, and forming opinions in places your CRM will never record.

Where are they? Reddit threads that appear in Google AI Overviews. Private Slack communities where someone asks "has anyone used X?" and three people respond. LinkedIn DMs between a VP and an analyst she trusts. WhatsApp groups of sector peers. ChatGPT conversations that leave no cookie. Cognism's data shows 77.5% of buyers share links through dark social channels, traffic that registers as "direct" in your analytics.

Reddit pages are cited 5.3 million times by Google AI Overviews, 5.5 million times by Perplexity, and 4 million times by ChatGPT, making it the **number one most-cited source across all major AI platforms**, three times more than Wikipedia. Cost per lead on Reddit for B2B SaaS runs \$45–85 versus \$120–200 on LinkedIn.

"Attribution software fails to measure social media accurately, communities at all, word of mouth at all, podcasts at all. Social media influence on pipeline is under-reported by about 70%."

CHRIS WALKER, REFINE LABS

<h2>5.3M</h2> <p>Reddit citations from Google AI Overviews alone</p>	<h2>77.5%</h2> <p>Dark social sharing B2B buyers sharing in untrackable channels</p>	<h2>3%</h2> <p>Self-identify via forms website visitors who fill a form · 6sense 2025</p>
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For Indian B2B founders: Add a free-text "How did you first hear about us?" field to every demo form. Run it for 60 days. In India specifically, WhatsApp peer groups are the dominant dark channel — peer buyers compare tools in ways that leave zero digital trace.

Shift 03 Brand Strategy

Brand Is Now a Measurable Moat, Not a Vanity Metric Finance Ignores

Les Binet's research established Share of Search as a leading indicator of market share with **an 83% correlation coefficient and a 6–12 month lead time**. Brand search goes up today, revenue follows in six months. Track it. Report it. Fund it accordingly.

Forrester is now explicit: "41% of B2B buyers begin their purchase journey with a single preferred vendor already in mind. Over 90% have a shortlist. Where do those preferences come from? Brand." Cognism CMO Alice de Courcy put the budget split clearly: **60–70% into demand creation, 30–40% into demand capture**. Most Indian B2B companies run this ratio in reverse.

The Ehrenberg-Bass 95:5 rule explains why this matters. At any given moment, 95% of your potential market is not actively buying. Performance channels reach only the 5% who are. Brand channels build preference with the 95% so that when they eventually enter the market, you are already on the shortlist.

"Brand demand is now a measurable metric. Track brand search volume. When buyers search for you by name, you bypass noisy SERPs and AI answer layers entirely."

COGNISM, DEMAND GENERATION PLAYBOOK 2025

<h2>83%</h2> <p>Correlation coefficient Share of Search predicting market share · Binet</p>	<h2>92%</h2> <p>Day One shortlist B2B buyers purchase from first consideration set</p>	<h2>95:5</h2> <p>The market ratio only 5% of your market is in-market at any moment</p>
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Shift 04 Founder-Led Growth

The Founder Is Now the Most Valuable Content Asset the Company Has

When AI generates most web content and discovery moves to dark channels, the signal that cuts through is a recognisable human voice with a point of view. Zerodha reached 16 million users with zero advertising spend. Nithin Kamath built India's largest retail brokerage by publishing genuine, sometimes uncomfortable opinions about investing — opinions people trusted because he was visibly accountable for them.

Sridhar Vembu at Zoho built a "barefoot billionaire" persona that earned a Padma Shri and helped position Zoho as the principled alternative to Silicon Valley SaaS. Girish Mathrubootham at Freshworks turned a competitor's condescension into a brand narrative that carried them to NASDAQ. Krish Subramanian at Chargebee addressed the international credibility gap by deeply embedding in SaaSBOOMi, building authority in a peer community first, then projecting it outward.

"Neutral is invisible in the AI age. Your opinion is your moat. If AI can explain what you do, you're in trouble. Create your own language, frameworks, methodologies."

B2B MARKETING TRENDS 2026 — PLURIBUS

Shift 05 Agency Economics

Token Costs Are Rewriting Agency Economics, and Nobody Has Told the Client

WPP fell out of the FTSE 100 in December 2025. Its share price dropped roughly two-thirds over the year. Ogilvy eliminated 700 employees. Omnicom cut 3,000. IPG laid off 3,200 in nine months. Meanwhile, Publicis hit a record 18.2% operating margin with 73% of its business model running through its AI infrastructure CoreAI.

Digiday's March 2026 investigation found at least seven distinct agency pricing models with no industry consensus. **AI-native agencies operate at 94–96% margins per asset. Traditional agency operating margins sit at 13–18%.** YC's Spring 2026 Request for Startups explicitly calls for agencies that operate with software margins.

<p style="text-align: center;">94%</p> <p style="text-align: center;">AI-native margins</p> <p style="text-align: center;">per asset vs 13–18% at traditional agencies</p>	<p style="text-align: center;">7</p> <p style="text-align: center;">Pricing models</p> <p style="text-align: center;">competing simultaneously, no standard · Digiday 2026</p>	<p style="text-align: center;">—</p> <p style="text-align: center;">WPP share price</p> <p style="text-align: center;">approximate decline over 2025</p>
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For founders using agencies: Ask three questions in your next contract negotiation: What percentage of deliverables involve AI generation? What is the pricing model? Can you show the compute cost of this

campaign? Move toward outcome-based pricing.

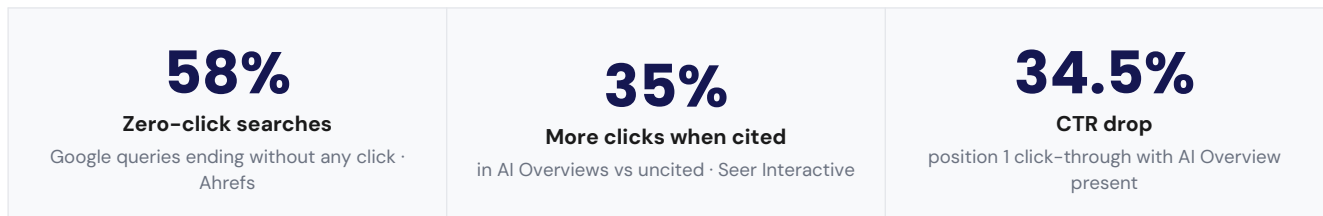
Shift 06 Search & Discoverability

SEO Is Not Dead, But the Easy 60% Is Gone and Won't Come Back

58% of Google searches now end without any click to an external website. Google AI Overviews appear on 15–35% of all US desktop searches with 2 billion monthly users globally. When an AI Overview appears, **position 1 click-through rate drops by 34.5%**. HubSpot's organic traffic fell from 13.5 million monthly visitors to under 7 million.

Grow and Convert's observation across their client base: rankings went up, traffic went down, and conversions stayed flat or grew — what they call "the decoupling." AI Overviews cannibalise top-of-funnel informational queries but leave high-intent commercial queries relatively intact. Pricing pages, comparison content, and proprietary benchmark reports showed growth over the same period informational content collapsed.

Seer Interactive's study of 25.1M impressions found that **sites cited in AI Overviews receive 35% more organic clicks and 91% more paid clicks** than uncited sites on the same queries. Reddit is cited 5.3M times by Google AI Overviews.



Shift 07 Content Strategy

Your Content Is Training the Models That May Recommend Your Competitors

Cloudflare's crawl-to-referral data tells an uncomfortable story. A decade ago, Google's ratio was 2:1. Today: Google is 14:1. OpenAI is 1,700:1. **Anthropic is 73,000:1**. AI companies are extracting extraordinary value from publicly accessible content and returning almost nothing in traffic.

AI companies committed an estimated \$2.92B in multi-year deals with publishers as of January 2025. Reddit earns \$203M annually from AI licensing, roughly 10% of total revenue. News Corp secured \$250M over five years from OpenAI. The Thomson Reuters vs. Ross Intelligence ruling in March 2025 found that AI training on copyrighted content is not fair use.

"Reddit got seven times more in AI licensing than the New York Times. Not because Reddit is better — because if you don't have Reddit, you don't have Reddit. Uniqueness is what AI companies pay for."

MATTHEW PRINCE, CEO CLOUDFLARE — SXSW 2026

73,000:1

Anthropic crawl ratio
pages crawled per referral sent

\$2.92B

AI licensing deals
committed to publishers · Jan 2025

\$203M

Reddit AI revenue
annual licensing income — 10% of total

Shift 08 Trust & Credibility

The Last Mile of Trust Is Now the Bottleneck: Correct Is Not Credible

Correct and credible are not synonyms. In B2B, where someone is about to sign a multi-year contract, the distance between those two words is the entire sales cycle. **Forrester's 2025 data: while 89% of B2B buyers use generative AI at every purchase stage, 19% feel less confident because of inaccurate or unreliable AI information**, and 40% cite conflicting information as their top complaint.

When purchases include AI-generated features or AI-assisted research, the buying group doubles in size: more stakeholders are added to verify what the AI surfaced. The average group is now 13 internal and 9 external participants. More people means more scrutiny. More scrutiny means more trust signals required, not fewer.

19%

Less confident
B2B buyers due to AI misinformation · Forrester

2x

Buying group size
doubles when AI features are part of the purchase

13+9

Stakeholders
average internal + external per B2B purchase

Shift 09 Content Operations

Content Cycles Have Compressed to Days: The Bottleneck Is No Longer Production

CMI's 2025 survey: **81% of B2B marketers use generative AI tools, but 54% take an ad hoc approach**, meaning they are producing more without a clearer strategy for why.

When AI generates most content, the individual piece becomes commodity. What retains value is the insight embedded within it: the data point nobody else has, the framing that makes a familiar problem legible in a new way, the opinion your ICP agrees with but has not yet articulated publicly. The content marketers thriving right now have stopped thinking of themselves as producers and started thinking of themselves as editors.

"81% of B2B marketers now use generative AI, but 54% take an ad hoc approach. The production constraint is gone. The strategic constraint just became the only constraint that matters."

CMI B2B CONTENT MARKETING REPORT 2025

Shift 10 Advertising & Distribution

Advertising Dollars Are Migrating from Platforms to People

a16z's framework: "From 1997 to 2024, the core internet business model was distraction: monetising partial human attention through advertisements. LLMs and agents do not get distracted." If agents increasingly mediate discovery and purchasing in B2B, the \$291B global online advertising market faces an existential question about what it is buying.

Richard van der Blom's analysis of 1.8M posts found a 50% decline in views for 95% of LinkedIn creators. **A \$5,000/month newsletter sponsorship with the right domain expert often delivers better qualified pipeline than \$50,000/month in LinkedIn Ads.** The measurement is harder. The outcome is not.

50%

LinkedIn reach drop

for 95% of creators · van der Blom 2025

\$111B

Influencer market by 2033

from \$6.3B today

3x

Engagement uplift

virtual campaigns vs real · B2B Trends 2026

Shift 11 Content Infrastructure

Your Content Library Must Become a Living System: Static Artifacts Are Decaying

A blog post published 18 months ago with a statistic from a 2022 report is now a liability. When a buyer asks ChatGPT about your category and your outdated content is cited, the wrong number follows you into a conversation you are not in. The half-life of static content has dropped to months, and for certain types — pricing, comparisons, technical specs — it is now days.

Mintlify monitors connected codebases and proposes documentation updates the moment code ships. GitBook's Computed Content takes an OpenAPI spec and auto-creates documentation that refreshes every

six hours. Both platforms support llms.txt, making your documentation preferentially citable by LLMs over competitors using static HTML.

Shift 12 GTM & Pipeline

The MQL Is Dead. Forrester, Who Invented It, Has Officially Said So

The marketing qualified lead was invented by SiriusDecisions (now part of Forrester) over twenty years ago. In 2025, Forrester published "Saying Goodbye to MQLs: We Promise It's Not Clickbait." Kerry Cunningham was direct: "Back when we created the MQL, understanding the engagement of a single person was pushing the limits of technology. Twenty years later, technology has evolved immensely, and the buying process has too."

MQLs track one person doing one action. B2B buying groups now average 8–13 stakeholders. When one person downloads a whitepaper, the MQL system records a lead. When 12 people from the same company are researching your category simultaneously, the MQL system records nothing. **Teams that shifted to account-level buying group qualification saw forecast accuracy jump above 90% and sales cycles shrink by 25%.**

"A single MQL is not a buying signal. A buying group is."

JON MILLER, MARKETO CO-FOUNDER — B2B QUALIFICATION FRAMEWORK 2026

95–99%

MQL failure rate

from inquiry to close · Forrester 2025

13%

MQL to SQL conversion

measuring the wrong thing

90%+

Forecast accuracy

for teams using buying-group qualification

Shift 13 Competitive Advantage

The Real Moat Is Speed of Insight: AI Has Made Speed of Output Irrelevant

When production is free, the constraint moves upstream to judgment. When anyone can generate a blog post in four minutes, the question of which post to generate, and what position to take, becomes the only differentiator. AI has not eliminated competitive advantage in content. It has moved it from execution to insight.

Speed of insight requires a specific practice: dedicated time each week scanning signals before they become mainstream. Customer support ticket themes. Earnings calls from category leaders. VC essays. Subreddit discussions where practitioners are articulating frustrations that no vendor has yet addressed. The founders

who do this weekly are the ones who appear prescient. They are just paying attention earlier.

Shift 14 Platform Dynamics

The Creator-to-Distributor Inversion: Platforms Own Distribution, People Own Trust

For two decades the content model was simple: you created, platforms distributed. That relationship has inverted. LinkedIn, Reddit, and ChatGPT now hold distribution. They decide which content surfaces, which voices get amplified, which sources get cited in AI Overviews. But what has not changed: the creator holds the trust relationship with the audience. A platform can amplify your words. It cannot inherit your credibility.

The question to ask is not "what does the LinkedIn algorithm reward this quarter?" It is "what does my ICP trust, and why?" The answer to the second question changes slowly. The answer to the first changes every six months. Build your strategy around the slow thing.

"Distribution is a commodity owned by platforms. Trust is a scarce resource owned by individuals. Build the thing that is scarce."

Shift 15 Defensibility

Community Is the Only Unscrapable Moat: AI Cannot Access What It Cannot Crawl

AI can replicate your blog post. What it cannot do is join your customer advisory board. It cannot access the thread in your private Slack where three customers are comparing your product with two competitors. It cannot be the reason someone in a peer group recommends you to a colleague they trust.

Pocket FM at \$200M revenue, Dream Sports at \$4B in gaming transactions: all built content as the wedge and community as the moat. SaaSBOOMi, deliberately small and curated, has built more successful Indian SaaS founders than any accelerator programme in the country. For Indian B2B founders selling internationally, community does double duty: it builds trust that geography sometimes requires you to earn explicitly, and it creates a reference network your competitors cannot access.

"Community is not a marketing channel. It is an infrastructure decision. Own at least one channel that AI cannot crawl, competitors cannot access, and algorithms cannot disrupt."

Framework

Decision Matrix

If This Is True for You, Do This

Use the conditions below to identify where your company sits. Not everything applies to everyone. The matrix tells you where to act first, where to monitor, and where to build.

If this is true for you...	Priority	...do this
Your product isn't mentioned when ChatGPT or Perplexity recommends tools in your category	Act now	Run an AI citation audit. Ask ChatGPT, Perplexity, and Claude to recommend tools in your category. Audit what cited players have that you don't: G2 reviews, Reddit presence, structured documentation. Goal: citation parity within 90 days
Your branded search volume is flat or declining quarter-over-quarter	Act now	Pull branded search from Google Search Console monthly. Calculate Share of Search against top 3 competitors via Google Trends. Report this to your board alongside pipeline metrics. Target: 10% branded search growth QoQ
Your founder hasn't published a genuine point of view publicly in the last 30 days	Act now	Commit to one LinkedIn post per week. Not a company update — a specific, data-backed observation from your domain. The test: would you be slightly uncomfortable publishing it? Commit: every Monday, minimum 8 weeks
You can't name the 5 communities where your US/EU ICP discovers new tools	Act now	Add a free-text 'How did you first hear about us?' field to every demo form. Run for 60 days. You will find 3–5 channels your analytics have never shown you. Do not sponsor before you listen
More than 40% of content budget goes to informational SEO content	Watch & shift	Audit your content by funnel stage. Flag all content that AI Overviews now answer better than you do. Redirect that budget to comparison pages, original benchmarks, interactive calculators. Target: 60% budget on bottom-funnel and original research
Your entire content library is publicly crawlable with no access controls	Watch & shift	Implement a tiered content access strategy. Top-of-funnel stays open. Your most valuable original research goes behind a light gate. Evaluate Cloudflare's bot management or Really Simple Licensing. You have more rights than you are exercising
MQL volume is your primary marketing KPI and SDRs qualify off form fills	Watch & shift	Run the Refine Labs "Split the Funnel" analysis. Track Declared Intent (demo requests, pricing page visits) separately from Low Intent (content downloads, webinar signups). A single MQL is not a buying signal

If this is true for you...	Priority	...do this
You spend more than 60% of marketing budget on performance channels	Watch & shift	Rebalance toward 60% demand creation and 40% demand capture. The 95:5 rule means performance channels reach only the 5% actively looking. The ratio your CFO wants is the opposite of the defensible one
Product documentation lags releases and is not machine-readable	Build this	Migrate to Mintlify or GitBook — both auto-update when code ships and output llms.txt. Add schema markup and publish an OpenAPI spec. Treat docs as a product surface, not a support resource. Goal: zero documentation debt at all times
You have no community you own — no private group, no advisory board	Build this	Start with a curated 30-person customer advisory group that meets quarterly. A private WhatsApp thread where your best customers share feedback. The bar is access and trust that competitors cannot replicate. Own at least one channel AI cannot scrape
You use an agency that bills by the hour and hasn't disclosed AI usage	Audit this	Ask three questions: What percentage of deliverables involve AI? What is the pricing model? Can you show the compute cost? Move toward outcome-based pricing — pay for pipeline, not hours. If they refuse to answer, that tells you what you need to know
You consistently react to trends three weeks after they form	Build this	Dedicate two hours per week to signal scanning: support ticket themes, earnings calls, VC essays, subreddit discussions. Publish your take before consensus forms. Speed of insight compounds. Speed of output does not.

Key Takeaway

The brands that become unmistakable to both humans and machines in the next 18 months will define the next decade of B2B in India.

Every shift in this report points toward the same scarce resource: judgment. The judgment to see what matters before consensus forms. The judgment to build trust relationships that no algorithm can replicate and no model can scrape. Indian B2B founders have built \$25B in global SaaS revenue by being relentlessly excellent at execution. The next chapter adds one requirement: being the loudest, clearest, most credible voice in a market where every competitor now has access to the same production tools you do. The invisible buyer is already forming opinions about your brand. The question is whether they know your name when it matters.

Primary Sources

6sense 2025 Buyer Experience Report · Gartner AI Agent Predictions 2028 · Forrester 2026 Buyer Insights · Digiday Agency Token Economics 2026 · YC Requests for Startups 2026 · CMI B2B Benchmarks 2025 · Semrush AI Overviews Study · Ahrefs B2B SEO Statistics 2025 · AI Licensing Deals & Search Visibility (Will Scott) · Richard van der Blom Algorithm Insights 2025 · Grow and Convert SEO Analysis 2025